WIRTHLIN WORLDWIDE

MEMORANDUM

TO — Southern Coalition for Advanced Transportation

FROM — Mike Dabadie, Robb Luckow

SUBJECT — Research

DATE — April 7, 2000

Based on quantitative research conducted in the Atlanta metro area in March, Wirthlin Worldwide has been able to develop a market segmentation to identify different markets to target in the research. Using segmentation, we are able to take large groups of information and divide the population into smaller clusters based on their attitudes relating to air quality, congestion, public transportation, pooling, and driving. We can then use demographic differences between the different segments to identify communications that are more effective with different groups of people based on these characteristics.

This research identifies five different segments in the data.

GROUP 1

This segment (27% of the population) forms our core or base of users of alternative transportation modes—50% have pooled and 46% have used public transportation in the last year, and they are more likely to use alternatives for errands. This group also tends to have more favorable overall impressions of public transportation and pooling. Also, this group has the highest level of Internet shopping/information gathering—an average of 7.5 times per week (4.5 average)—likely a result of the high proportion of young people and students in the segment. Some key demographics of this group:

- Equally male and female
- Youngest segment – 59% are under the age of 35
- Highest concentration of students (12% / 4%)

- Single (65% / 27%)
- Minority (74% / 36%)
- Liberal (40% / 25%)
- Lower income (55% under $40,000)
- Live inside (60% / 23%) and work inside (67% / 42%) / both (47% / 17%)
- No children (78% / 61%)

The goal of communications for this group is reinforcing their behavior and keeping them from becoming SOV users. One concern will be that—even though they have experience with alternatives—their use may be more out of necessity or convenience instead of choice. This group is younger, single, and lower income than other groups. As these individuals age, get families, and increase their income, they may aspire to drive.

With that concern in mind, some key issues to maintain and swing this group toward the use of public transportation:

- Ensuring people have transportation choices (8.4 / 7.5)
- Higher than average stress-related concerns [Dealing with traffic is stressful (5.8 / 5.6); Worry about road rage (4.4 / 4.0); Carpooling will reduce stress in my life (3.6 / 2.9)]
- Higher than average concern about health impacts

This group has an average concern about air quality and congestion. They are optimistic about the direction of Atlanta (80%).

GROUP 2

This segment (21%) is the key public transportation and pooling growth potential. This group has the highest levels of awareness (8.0 air / 9.3 congestion) and concern (9.2 air / 9.4 congestion) about air quality and traffic congestion problems of any other group.

This group is more likely than average to have pooled to work in the last year (44%), but has lower usage of public transportation. This group has better than average impressions of alternatives and is unhappy with their SOV commutes [I spend too much time traveling in my car (4.5 / 3.9)]. Their commute time is longer than any other segment (36 – 37 minutes). It has gotten worse over the past four

years and they expect it to continue to get worse. Key demographics
of this group:

- More than 2/3 female
- Age 35-54 (56% / 46%)
- Married (81% / 54%)
- Half have children
- College or more education (52% / 46%)
- Higher income -- $80,000 + (38% / 25%)
- Homemakers (14% / 6%)
- Lives outside the perimeter (93%)

In addition to the health, air quality, congestion, and other
concerns identified above, some key issues that can be used to swing
this group toward the use of public
transportation/pooling/alternatives to SOVs include:

- Focus on reducing stress and frustration. [Dealing with traffic
  is stressful (6.2 / 5.6), Congestion frustrates me (5.9 / 5.5),
  Worry about road rage (4.6 / 4.0)].
- Strongest concern about the effects of urban sprawl on reducing
  green space and natural areas (6.2 / 5.5).
- Strongest concern about the health impacts of the air.
  [Concerned about the effect that driving has on Atlanta's air
  quality (5.7 / 4.7), health impacts of breathing the air (6.0 /
  5.2)].
- Strong concern about the impact of their behavior on the air and
  congestion. [Concerned about the effect of driving on Atlanta's
  air quality (5.7 / 4.7); By driving for errands, I am adding to
  congestion (5.8 / 4.9)].

This group also shows the greatest openness of any other segment to
use public transportation or pooling—its scores on the scaling
questions are equal to or higher than those even of the *core users*.
The hurdle for these groups are "living too far from public
transportation" (6.2 / 5.3) and "public transportation can take me
where I need to go" (2.8 / 3.3).

Segment 1: Core Users
- Split evenly between men and women
- Optimistic – believe things are headed in the right direction
- Lower to average concern and awareness of air quality and congestion problems
- Place high importance on everything, most notably improved quality of life (9.0) and residing in a livable and likeable community (9.0)
- More likely to car or van pool (51%) or use public transportation (38%) to go to work in last year, and more likely to car pool (6.3 times per week) or use public transportation (1.7 times per week) for errands
- High likelihood to use the Internet to shop (6.1 times per week)
- More favorable reactions to public transportation message statements
- Believes commute will get better in next 4 years
- High: Pool for errands (6.1 times per week)
- More favorable reactions to public transportation message statements
- Believes commute will get better in next 4 years
- Youngest age group of respondents
- No children (78%)
- More liberal
- Lowest income
- African American (58%)
- Single (68%)
- Students (13%); average level of employment (78%)
- Lives inside the perimeter (50%)
- Works inside the perimeter (60%)
- Fewest number of years in Atlanta area (13)
- Average level of Internet access, but lower than average at home

Segment 2: Swing: Pro Public Transportation but Low Use
Key issues are "stress" and "frustration" – message focus on how to reduce these
- Highest awareness and concern about air quality and congestion
- Longest commutes (39 minutes)

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- High importance scores, particularly for livable and likeable community (9.5), time with family and friends (9.4), improved quality of life (9.2), minimizing stress and frustration (9.0), and more time to do things want (9.0)
- Second highest rates of pooling (41%) and public transportation use (12%) in the last year
- Low SOV use to run errands (12.3 times per week)
- High: Spends too much time traveling in car (4.4 vs. 3.9)
- Low: Driving car gives opportunity to escape pressures of life (2.6 vs. 3.6)
- High: Concern about driving's effect on air quality (5.6 vs. 4.6)
- High: By driving I am adding to the congestion problems (5.6 vs. 4.8)
- High: Live too far from public transportation to use it (6.3 vs. 5.7)
- High: If public transportation were more available, I would use it (5.4 vs. 4.5)
- Low: Public transportation takes too much time (3.7 vs. 4.4)
- Low: I don't like to stick to a fixed schedule (3.9 vs. 4.7)
- Urban sprawl reduces green space (6.2 vs. 5.5)
- Concern about breathing and health
- Thinks commute in future will get worse
- Heavily female
- Least likely to think things are going in the right direction
- Have children (50%)
- Middle age +
- Somewhat higher education
- Above average income
- White (85%)
- Married (82%)
- High in homemakers (13%)
- High home Internet access

Segment 3: Swing: Auto-Dependent I – Telecommute Potential

Male, high SES, white collar, cars give freedom and independence, telecommute potential

- Heavily male
- Aware of air quality and congestion problems; average concern (7.8; 8.7)
- High levels of importance for many issues: liveable communities (9.4), time with family and friends (9.3), mobility and freedom (9.3), quality of life (9.3), more time (9.2)
- Highest level of drive alone commuting (9.2 times)
- Low pooling (28%) and public transportation (4%) to work in last year
- High telecommute in last year (47%)
- Slightly lower than average errands, but likes to have car available for errands
- High: Driving gives freedom (6.0 vs. 5.3)
- High: Driving allows me to escape pressures of day (4.2 vs. 3.6)
- High: lives too far from public transportation to use it (6.3 vs. 5.7)
- Generally ambivalent/average towards public transportation
- Does not like to depend on others (6.2 vs. 5.7) or stick to a set schedule (5.4 vs. 4.7)
- High: Urban sprawl creates jobs (5.4 vs. 5.0)
- Lower frustration and stress levels
- Half have children at home
- Highest socio-economic status
- Very high full time employed (92% vs. 67%)
- High professional/technical/managerial (77% vs. 54%)
- Travel to multiple work sites
- High home and work Internet access
- Slightly more conservative

Segment 4: Auto-Dependent II

Drives everywhere, many errands, unfavorable impression of public transportation, women with children, lower understanding of own impacts on congestions, lower concern in general

- Heavily female (73%)
- Lower awareness and concern about air quality and congestion problems
- Important issues: time with family and friends (9.1), having more money (9.1), likeable community (90)
- 30 minute commutes
- Low public transportation usage (8% in last year to work; never for errands)
- Low telecommute in last year(26 vs. 39%)
- Highest number of errands (about 6 per day) and high number of errands run per week by car (29 vs. 16) and pool (8 vs. 5)
- Low Internet (1.7 times for shopping vs. 3.6 and 34% no Internet access)
- High: traffic is stressful (6.2 vs. 5.6) and congestion is frustrating (6.2 vs. 5.5)
- High: spend too much time traveling in car (4.4 vs. 3.9)
- Concern about public transportation safety (5.1 vs. 4.2)
- Unfavorable opinion of public transportation (3.7 vs. 4.4)
- Low: If public transportation more available, I would use it (3.2 vs. 4.5)
- Don't like to depend on others (6.3 vs. 5.7) or stick to a set schedule (5.1 vs. 4.7)
- Lower concern about health and breathing impacts
- Congestion will get worse in next four years
- Highest percentage with children (58%)
- Lowest education levels
- Middle incomes
- High percentage of whites (85% vs. 72%)
- Higher single (26% vs. 22%)
- High homemaker (13%)
- Highest clerical and sales (22% vs. 9%)
- Live and work outside the perimeter

Segment 5: Auto Dependent 3: Seniors and Retireds
- Slightly male
- Somewhat lower awareness and concern
- Low importance scores across the board
- Lower Internet usage and access
- High: Feels good about efforts to reduce congestion (4.7 vs. 4.3)
- High: One person cannot make a difference (3.2 vs. 2.7)
- No children (82%)
- High widow (13%)
- Oldest
- High retired (50%) / 36% employed
- Somewhat conservative